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Division of Health Care Access and Accountability
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To:	Process Help Users
From:	Shawn Smith, Bureau Director Bureau of Enrollment Policy and Systems
Re:	**Process Help Release 13-02**
Release Date:	06/19/2013
Effective Date:	06/19/2013

EFFECTIVE DATE

The following process additions, clarifications or changes are effective 06/19/2013 unless otherwise noted. **Yellow text denotes new text. Text with a ~~strikethrough~~ it in the old process/policy section denotes deleted text.**

CHANGES

1.4.2 1 Priority Service and Expedited Issuance Overview

Local agencies must offer priority service interviews and/or issue expedited benefits to every applicant that qualifies. 'Priority services' refers to whether or not a person must be offered an interview ~~the same day or next working day from~~ within 7 days from the filing date of the application date of the application. 'Expedited issuance' refers to how quickly the FoodShare benefits will be available to the customer.

See FSHB 2.1.3.1 and FSHB 2.1.4.1.

1.4.2.1.2 Updating the Priority Service Determination Screen

This entire subsection is new with this release. The text changes are too numerous to list.

With the insertion of this subsection, the following subsection number has changed:

~~1.4.2.1.2~~ Expedited Issuance → 1.4.2.1.3 Expedited Issuance

2.3.5 Processing Priority Service Applications

This entire subsection is new with this release. The text changes are too numerous to list.

3.3 Person Delete

Interfaces between CARES and KIDS, EBT and ForwardHealth Interchange (iC) are based on the primary person's information. Changing the primary person in CARES will cause problems with those interfaces. If there is a reason the primary person should be changed, please contact the CARES Call Center for advice. Impacts to a case when the primary person is changed include:

- Inaccurate referrals to KIDS The KIDS case is set up based on the primary person.
- The CARES to iC interface is also based on the primary person listed on the case.
- Changing the primary person generates a new EBT card and can cause confusion and problems with access to food stamp benefits.
- Fatals can occur on cases for current and past eligibility when the primary person is changed. CARES builds different sequences of AGs and is unable determine the correct AG.
- If the primary person is being changed to correct a problem with the SSN or duplicate PINs, the individual may lose eligibility history, work program history and benefit recovery claims if the wrong PIN is chosen during the process.
- Depending on the case composition, etc., the correct application or signature may not be in the record. If the primary person is no longer in the home,

there may not be another adult in the household who has signed the application or review forms. It's also possible that the entire household composition has changed and needs to be re-evaluated.

44 Data Exchange (CWW)

This entire section has been rewritten. The changes are too numerous to list.

53.1 Workload Dashboard Overview

~~You will locate the Workload Dashboard from the Cares Worker Web (CWW) Navigation Menu. Under the Worker Tasks heading there are links to both the Workload Dashboard and Work Item Search Page.~~

Workers can access the Workload Dashboard from either the Cares Worker Web (CWW) Navigation Menu or CWW Homepage.

A worker is able to open the Workload Dashboard from the CWW Navigation Menu under the Worker Tasks heading where there is a link to both the Workload Dashboard and the Work Item Search Page.

A worker's personal dashboard is located on the CWW Homepage under "Recent Cases/RFAS/ACCESS Applications/Change Reports." A worker is able to display and view other Dashboards that they may have open on the Workload Dashboard page by using the "View Workload Dashboard" button.

Note: For workers without access to the Workload Dashboard, this link will direct the worker to an error message on the Workload Dashboard page.

Workload Tracking Processing Suggestions

1. In a worker absence you may consider viewing his/her Dashboard and reassigning work items that are due in <1 ~~days~~ Days Left to Complete to others for processing.
2. When viewing a Team Dashboard consider balancing the work items across the team.
3. Be aware of Application Work Items that are in the ~~"application processing"~~ "Case Processing" status. This implies that the application may have been abandoned in driver flow.
4. Be aware of SMRF Work Items that are in the "SMRF Processing" status. This implies that the case may have been abandoned in driver flow.
5. View the Consortia or County Dashboard to monitor aging items or ~~many~~ items that are in the <1 ~~day~~ Days Left to Complete category.

53.2.1 Opening A Workload Dashboard Introduction

When accessing the Workload Dashboard from the CWW Homepage, your own Dashboard will display. When accessing the Workload Dashboard from the CWW navigation menu, your own Dashboard will also display by default.

Process At a Glance:

1. Click on the Workload Dashboard located in the CWW Navigation Menu or Click on the "View a Workload Dashboard" button on your CWW Homepage.

Step by Step Process:

1. Open the Workload Dashboard Page from the CWW Navigation Menu or open the Workload Dashboard Page from the CWW Homepage.
   a. Under the Worker Tools section ~~County/Tribe~~ on the Navigation Menu select Worker Tasks and click on the Workload Dashboard link, your Dashboard will be displayed.

   OR

   b. Click on the "View Workload Dashboard" button from the CWW

Homepage.

3. Select the radio button next to the type of Dashboard that you would like to open (Worker, Team, County/Tribe, IM Consortium, or State). **Note:** Only the type of dashboards that a worker can open based on CARES security will appear as options
    a. If you are a worker with a security level of 25 you will have two options; Worker or a Team dashboard. (See Screenshot below). You are able to open another Worker or Team's Dashboard within your consortium or W-2 geographical area. For W-2, you may also open a team Dashboard of any team to which you belong, even if that team is in another geographical area.

53.3.2 Work Items

The changes are too numerous to list.

53.4 Work Item Information Panel & Work item flag

This entire subsection is new with this release. The changes are too numerous to list.

With the insertion of this subsection, the following subsection numbers have changed:

~~53.4~~ Work Items Search and Reassign	→	53.5 Work Items Search and Reassign
~~53.5~~ Work Items Details	→	53.6 Work Items Details
~~53.6~~ Work Items Best Practices	→	53.7 Work Items Best Practices

53.5.1 Work Item Search by IM Consortia, County/Tribe or Team

Step by Step Process:

3. Select the ~~IM Consortium~~ County/Tribe radio button and a ~~consortium~~ county from the drop down box. You can also select the IM Consortium radio button and a consortium from the drop down box. You can select the W-2 Geographical Area radio button where all teams that have been created across the entire Geographical Area will appear.

4. To narrow the search by Counties or Teams choose "yes" under the 'Narrow Further' question.

    Note: The "Narrow Further" drop-down is not an option if W-2 Geographical Area is selected. Choosing W-2 Geographical Area will require users to select at least one team if any.

53.5.5 Work Items Search Results

The changes are too numerous to list.

53.5.6 View and Select to Reassign Work Items

Under 'What would you like to do?', the View and Select to Reassign Work Items radio button is defaulted.

~~This selection is (Defaulted)-~~ After clicking the Go button:

53.5.6.1 View and Select to Reassign Work Items Meeting the Above Criteria

Step By Step Process:

2. Now you may select one of three options:
    a) Reassign to Me- which assigns all of the selected work items to you
    b) Reassign to a Team-Select the Team from the dropdown list that you would like to assign the Work Items to. Choose from the following:
        - ~~choose if you would like to~~ Assign to Team Lead
        - Assign to Backup Lead
        - ~~Or Members by selecting the corresponding checkboxes.~~
        - Assign to Workers

3. You ~~now~~ must now make a selection within “What would you like to do.”
    a) ~~Select~~ By Selecting the radio button next to Reassign Work Items in the ‘Work Items to Reassign’ Section, the system will reassign the work items that have been added to the Dynalist. Click the return button
    b) Selecting to Reassign All Work Items in the Work Item Search Results Section will reassign all the items displayed. Click the Return button and a warning message will display ~~if~~ verifying that you want to proceed, click on the Return button to continue

53.6.1 To Reach This Page

1. From the search results page
    c) From the Work Item Panel

53.6.2 Page and Field Description

Work Item Details shows the current details of a Work Item. The Work Item ID number is displayed as well as the Category of the Work Item. There is also a link to the Case that the Work Item is associated with. From this section, you also have the option to:

Below the header, two tables may show:

Work Item Details - a row will display for every change that occurs. The table consists of the following columns:

- APP/RFA/Case
- Flag
- Caseload Owner
- Work Item Owner
- County
- IM Consortium

Work Item Type Details - this will display only if a change occurs to the work item type. The table consists of the following columns:

- Type
- Status
- ~~Begin~~ Due Date
- ~~Due~~ Begin Date
- End Date
- End Reason

53.7 Work Items Best practices

Use Two CARES Worker Web Sessions

Option 2
Click on the Windows Start button and open a new Internet Explorer page, bring up a new Gateway page and log into CWW.

Dashboard Versus Inbox

New Program request on an open case will be assigned ~~to the worker that initiated the request and will become the Work Item Owner~~ to either the Signed-In Worker or the Primary Worker (whichever the agency indicated). The status for program requests will have a status of “Case Processing” and will show up in the 15-30 days column of the Work Item Owner. The case remains with the Primary Worker.

Real Time Data

Work and Team Dashboards display real-time data. These can be refreshed by clicking the Refresh button at the top of the page. The County/Tribe, IM Consortium, and State Dashboards are not real-time data, but rather display data that is refreshed on a nightly basis. It will be easier for a supervisor, who is monitoring work on a dashboard, to view the Team or Worker Dashboards since these are updated with real time data, rather than using the County/Tribe or IM Consortium Dashboard to monitor work being completed. The County/Tribe or IM Consortium Dashboard provides a "bigger" picture view. See PH 53.1.

You can create a team with all of the workers that belong to a County/Tribe or IM Consortium so as workers complete work you can view that Team's Dashboard to see worker being completed in real time for the entire County/Tribe or IM Consortia.

Quick View of Work Item(s) Nearing Due Date

Supervisors and Workers can utilize the dashboard to see a quick view of Applications and SMRFS that are near the 30 or 10 day processing time and proactively re-assign the work as a higher priority to process as needed. Work items under the <1 column are either due today or are past due. See PH 53.1.

Unprocessed Documents

If your agencies workflow includes a team that handles all unprocessed documents the team or workers may use the Dashboard to pull out all cases that have unprocessed documents for cases that are in the "<1 day to complete" to either approve or deny benefits. A Worker can also use this feature to proactively find Applications or SMRFs with documents that are not due yet and approve benefits if all information is present. See PH 53.5.5.

Some suggestions:

- Use the Team Management Tool with the Workload Dashboard
  - One example of how you can utilize the Team Management Tool to assign multiple Work Items is to build a team with the supervisor as the Team Lead and the workers that are part of that team. ~~When~~ Reassigning Work Item(s) to a team eliminates an extra step of having to reassign individually. When reassigning to a team you can also choose to reassign items to the Team Lead and the Backup Lead(s) or just the workers on that team. Reassigning multiple work items to a team also round robins the work amongst the members of the team.

- ~~For Expedited FoodShare~~
  - ~~If FoodShare was confirmed expedited and passed, there is no second run. The work item updates the FS PS type and creates a new type for regular FS. For these, you will need to run the case a second time, to get the regular FS confirmed. You will see this on the Work Item where it shows an end date for FS PS but not for FoodShare.~~

56.2 Employer Verification Of Health Insurance - EVHI

This section has been moved to 44.4.6.1 Employer Verification of Health Insurance.

81 ForwardHealth iChange

The following chapters have been removed:

81.1.1 Crosswalk MMIS / EDS Net -to- ForwardHealth iChange Matrix
- 81.1.1.1 Member Search
- 81.1.1.2 Member Maintenance
- 81.1.1.3 TPL
- 81.1.1.4 Provider
- 81.1.1.5 Premiums
- 81.1.1.6 ID Cards
- 81.1.1.7 Reports

The information can be found in the ForwardHealth iChange Training Guide.

81.3 Electronic F 10110 (formerly the 3070 and HCF-10110)	**Note:** Once an F-10110 ~~reaches the ForwardHealth~~ is submitted to the fiscal agent via fax~~, they will assign an Internal Control Number (ICN) and it will be~~ it is scanned and batched for processing. The F-10110 will be entered into iChange within ~~three~~ 2 working days from the day the form was received (3 working days if received after 2PM). Eligibility is not updated the same day that an F-10110 is faxed unless the update is marked as an emergency. Please do not send ~~multiple~~ duplicate F-10110 forms for ~~the same~~ an individual. ~~until you verify the information has not been updated on iChange. And it has been more than~~ If the information has not been updated within three working days since you submitted the original form, contact an HP eligibility analyst at 608-224-6521. ~~If the F-10110 is sent and the eligibility segment on the Benefit Plan Panel in iChange is not updated, do not send an additional F-10110 without first contacting the ForwardHealth Eligibility Analyst assigned to your county to find out if there are other issues with updating the eligibility.~~
81.4 ForwardHealth iChange Contacts	**BC+/MAPP Premium line** – 888-907-4455 (IM workers select menu #3)
81.5 Med Stat Code Chart	The Med Stat Code Chart has been updated. The changes are too numerous to list.